

# Review an External Representative's Profile Information

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## Process

[IRMS EXTERNAL ACCESS SECURITY](#)

## Effective Date

08/16/2005

## Purpose

The Review an External Representative's Profile Information task provides specific information for reviewing the profile information of another External Representative who has access to IRMS. All profile information except SSN and password can be viewed by any other External Representative within their specific locality/agency. An External Representative typically performs this task when there is a need to find out who else within your office has access to IRMS. The Special Notes and Procedure will assist you in the manual process of reviewing your, or a co-workers profile information in IRMS.

## Special Notes

- An External Representative cannot view his/her own or a co-worker's SSN or password information.
- An External Representative cannot view information for another Representative outside of his/her own locality/agency.

## Procedure

### Responsibility

External Representative

### Steps

1. Determine the business need to access another External Representative's (user's) profile information.
2. Perform a Search in IRMS.
  - A. Select "Administrative: Search TAX Representative" from the main menu to perform the Representative Search  
**NOTE:** The TAX Representative Search window opens.
  - B. If you are searching for the External Representative by User ID,
    1. Enter the User ID.
    2. Click SEARCH.  
**NOTE:** The system opens the appropriate user's profile.
  - C. If you are searching for the user by last name,
    1. Enter the last name.  
**NOTE:** If the complete last name is not known, enter at least the first three letters of the users last name and a wild-card(\*) to find all users meeting that criteria.
    2. Click SEARCH.

3. Select the appropriate Representative to view.

**NOTE:** The system opens the user's profile.

- D. If you are searching by office, section, or unit,
- E. Enter the office, section, or unit of the user.
- F. Click SEARCH.
- G. Select the appropriate Representative to view.

**NOTE:** The system opens the user's profile to view.

3. Review the information and validate or obtain needed information.
4. Close the External Representative's (user's) profile.

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